

#### State of California Department of Health Services



May 30, 2003

CHDP Program Letter No. 03-08

TO: ALL COUNTY CHILD HEALTH AND DISABILITY PREVENTION (CHDP)

PROGRAM DIRECTORS, DEPUTY DIRECTORS, MEDICAL CONSULTANTS, STATE CHILDREN'S MEDICAL SERVICES (CMS) STAFF AND REGIONAL

OFFICE STAFF

SUBJECT: CHDP PROGRAM DATA REPORTING SYSTEM

The CHDP Program is implementing a CHDP Program Data Reporting System that will give local CHDP Program staff the capability of viewing up-to-date CHDP reports via the Internet using Business Objects (BO) software. These reports are produced using data generated by the Department of Health Services (DHS) Fiscal Intermediary, Electronic Data Systems (EDS) from the Confidential Screening/Billing Report forms (PM 160s) and the CHDP Provider Master File.

#### **Getting Started**

Access to the CHDP Program Data Reporting System is permitted with a user identification (ID) and password unique to each individual. This password is to be kept confidential and specific to the user ID. To issue a user ID and password, the CMS Branch must receive a Data Account Activation/Deactivation Request form (Enclosure 1) signed by the CHDP Deputy Director and a Confidentiality Oath (Enclosure 2) signed by the user. Please note that requirements to retain a confidentiality agreement with an original signature make it necessary that the signed agreement be mailed to the address on the form.

Upon confirmation by the CMS Branch that the ID and password have been entered into the system the DHS Information and Technology Services Division will send users written notification of their user ID and password. The notification will include an attachment that provides instructions on Login, Running and Printing Reports, Logoff and Report Descriptions. These instructions are attached to this program letter as (Enclosure 3).



Do your part to help California save energy. To learn more about saving energy, visit the following web site: www.consumerenergycenter.org/flex/index.html

Internet Address: http://www.dhs.ca.gov/pcfh/cms

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If any of the users within your local CHDP Program change, please use the Data Account Activation/Deactivation Request form to notify the CMS Branch to discontinue the user ID.

#### **Standard CHDP Reports**

The initial development of CHDP standardized reports, also known as Corporate Reports has focused on those reports formerly produced by the CMS Branch Data Analysis, Research and Evaluation Unit. These reports include a list of active CHDP providers, the number of claims paid and denied by provider and funding source, and the number of claims by age group and funding source.

These reports are among the first that are available for your county or city local program. We expect the number of standard reports will grow as the CHDP Data Reporting System is implemented. We will look to input from users to assist with this future development.

#### **Change Requests**

To track and respond to requests for any changes to the reports, please use the Change Request (CR) form (Enclosure 4). The CR forms must be approved by the local CHDP Program Director or Deputy Director. A copy of the signed request sent by fax or an email sent directly from the CHDP Director/Deputy Director is acceptable.

#### Original Signed by Maridee Gregory, M.D.

Maridee A. Gregory, M.D., Chief Children's Medical Services Branch

**Enclosures** 

### Children's Medical Services Branch Child Health and Disability Prevention (CHDP) Program CHDP Data Activation, Modification, Deactivation Request

This form is to be used by the local CHDP Program Deputy Director to request access to CHDP data through Business Objects for local CHDP Program staff. This request will result in the assignment of confidential user identification (ID) and password. The form is also to be used to request modification or deactivation of a user ID. Please fill in the appropriate checkboxes, complete the required information for all requests, and attach a signed Confidentiality Oath for each person you add to the list. Please allow two week from the claim submitted for processing new requests.

STAFF PERSON INFORMATION					
Select One	Name	Position	Confidentiality Oath		
<ul><li>□ Add</li><li>□ Modify</li><li>□ Delete</li></ul>			□ Signed □ Attached		
<ul><li>Add</li><li>Modify</li><li>Delete</li></ul>			☐ Signed ☐ Attached		
<ul><li>Add</li><li>Modify</li><li>Delete</li></ul>			<ul><li>☐ Signed</li><li>☐ Attached</li></ul>		
<ul><li>Add</li><li>Modify</li><li>Delete</li></ul>			□ Signed □ Attached		
<ul><li>Add</li><li>Modify</li><li>Delete</li></ul>			☐ Signed☐ Attached		
	Local CHDP Program:				
Signature: _	Signature of Deputy Director	)			

SYSTEM ADMINISTRATOR (SA) USE ONLY				
Application	SA Initial			
Establish CHDP				
Establish CHDP				

Questions? Contact Carol Tetz at: <a href="mailto:ctetz@dhs.ca.gov">ctetz@dhs.ca.gov</a>

Phone: (916) 327- 2271 Fax: (916) 327-0997

# Children's Medical Services Branch DEPARTMENT OF HEALTH SERVICES Child Health & Disability Prevention (CHDP) Program Confidentiality Form Release COMPUTER FILES RELEASE/ACCESS OF THE MEDI-CAL and CHDP PROGRAM

#### **CONFIDENTIALITY OATH**

As a condition of obtaining access to data and fiscal/reporting records utilized/maintained by the State Department of Health Services and its fiscal intermediary, I agree not to:

- 1. Divulge any information obtained in the course of my assigned duties to unauthorized persons, and
- 2. Publish or otherwise make public any information regarding persons(s) receiving Medi-Cal and CHDP services such that the persons who received such services are identifiable.

Access to such data shall be limited to state and federal personnel who require the information in the performance of their duties, and to others such as local health department CHDP program staff as may be authorized by the Department of Health Services.

I recognize that unauthorized release of confidential information may be subject to civil and criminal sanctions pursuant to the provisions of the Welfare and Institutions Code Section 14100.2.

County/City Local CHDP Program	
Signature(s) CHDP Data Users:	Date:
	·
	<u> </u>

Return Form to: Department of Health Services

Children's Medical Services – Attn: Carol Tetz

P. O. Box 942732

Sacramento, CA 94234-7320

Revised: April 3, 2003

#### Introduction/Background

The Department of Health Services (DHS) is developing a CHDP reporting system that will enable you to view up-to-date CHDP reports via the Internet. These reports are produced using data generated by the DHS fiscal intermediary (EDS) from the Confidential Screening/Billing Report forms (PM160s) and the CHDP Provider Master File as of July 1, 2002.

The number of reports available through the CHDP Internet reporting site will continue to grow based on program needs and your feedback. You will continue to receive the CHDP Summary of Screens by Funding Source C-1B hardcopy report from the DHS; however, we are hoping that this Internet-based reporting system will eventually replace the current process. In the future, we expect to provide "ad hoc" reporting capabilities that will allow you to request and receive specific reports within a short turnaround period.

By following the step-by-step instructions below, you should be able to log into the Internet and access CHDP data for your Local CHDP Program. However, we have found that Internet access authority or other desktop adjustments may be needed on personal computers in order to successfully log-in.

To use Business Objects, you need an Internet browser and access to the DHS Intranet or Extranet. If you encounter problems logging-in or want to be walked through the process, please contact Carol Tetz at (916) 327-2271 for assistance.

#### **Minimum Internet Browser Standards**

The standard format for viewing the CHDP Data Reporting System is HTML unless you make other arrangements as noted on page 10. When viewing documents in HTML Format you need, at a minimum, access to the Internet and :

Microsoft Internet Explorer Version 4.0 Netscape Version 4.0

Another format for viewing documents may be made available upon request as noted on page 10. The Enhanced Document Format requires that your system permits download capabilities and a portable document reader. When viewing documents in Enhanced Document Format, you need, at a minimum, access to the Internet and

Microsoft Internet Explorer Version 5.5

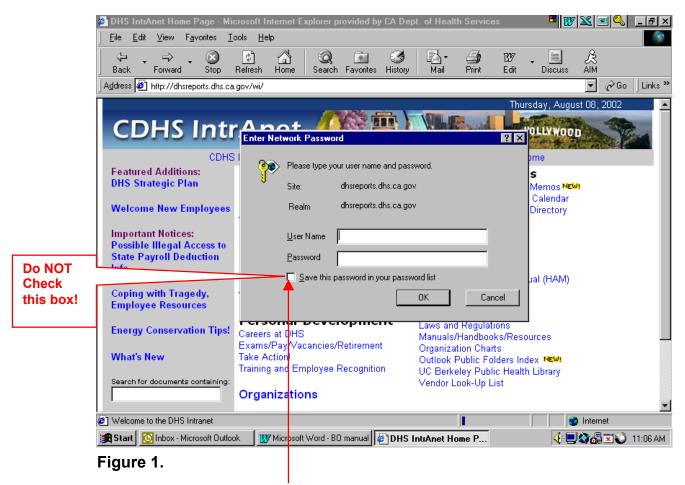
#### **Business Objects**

#### Child Health and Disability Prevention (CHDP) Reporting System Login, Running and Printing Reports, Logoff and Report Descriptions

#### A. Intranet/Extranet Login

- 1. Start your Internet browser. Type in the following web address.
  - Local CHDP Program Users connect to the DHS Extranet site https://www.dhsreports.ext.dhs.ca.gov/wi
- 2. You will see an "Enter Network Password" window. See Figure 1.
- 3. Enter your User Name and password, then click OK.

Note: First time login to the Extranet/Intranet will require you to change your password.



**NOTE:** Do not check the 'Save this password in your password list' box. You will be prompted to change your password every 60 days. To change your password you will be required to enter your Old Password and then enter your New Password. Many users that have checked the 'Save this password in your password list box' will forget their Old Password (having entered it only once) when prompted to change their password.

Prepared by the California Department of Health Services CHDP Program, CMS Branch

4/18/03

- A Password Change Utility window will be displayed. See Figure 2.
- 5. Enter the user ID provided to you in the Account box.
  - Enter the password provided to you in the Old password box.
  - Enter a new password in the New password box.
  - Enter the same new password in the Confirm new password box.
  - Click on OK.

Remember to keep your new password confidential and in a secure place.

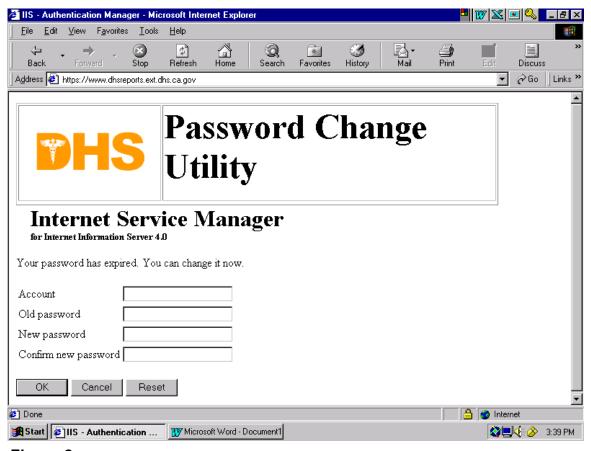
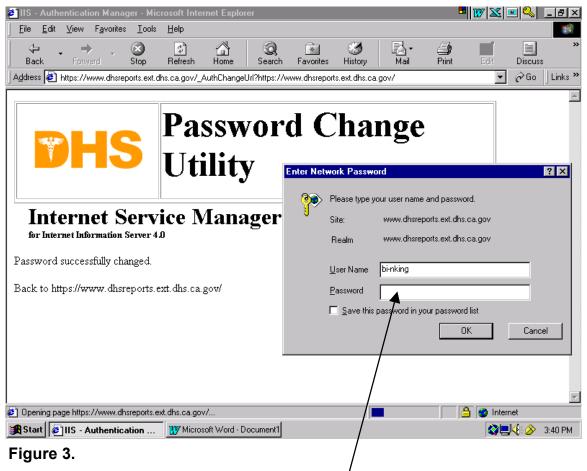


Figure 2.

**Note:** Approximately every 60 days you will be prompted to change your password. After you've been prompted to enter your User Name and Password in the 'Enter Network Password' pop-up window as shown in Figure 1, you will be directed to change your password via the 'DHS Password Change Utility' Screen as shown in Figure 2.

Follow the instructions outlined in step 5 above. The New Password will be valid for 60 days.

6. A Password Change Confirmation window will be displayed. See Figure 3.



Complete the sign in process by entering your New Password into the Password Box on the 'Enter Network Password' window.

- 7. After successfully entering your user name and password you will get the CDHS Reporting Systems Log In screen. See Figure 4.
- 8. Click the Log In button. Your InfoView Page will be displayed.

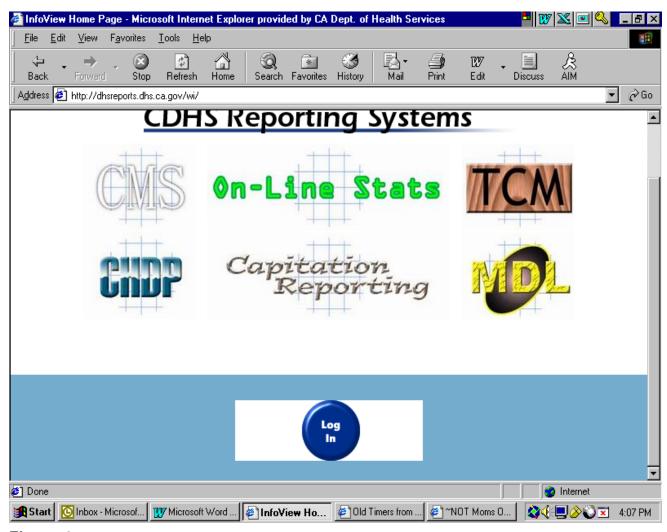


Figure 4.

9. The Corporate Documents screen is the default. See Figure 5.

This is your main interface for viewing and running your documents. This screen will list all the Corporate Documents that are available for you to run and view. To get back to this page at any time, click 'My InfoView' in the navigation bar across the top of the CDHS Extranet Screen.

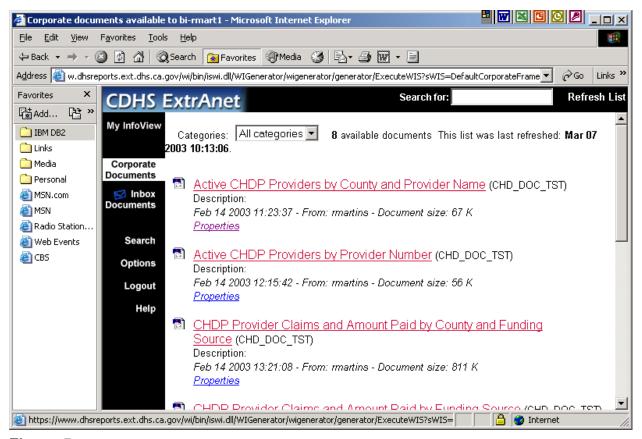


Figure 5.

#### **B.** Running Reports

 Select the report you want to run from the Corporate Documents Page. Click on the name of the report. See Figure 6. To view the properties of the report, click 'Properties'.

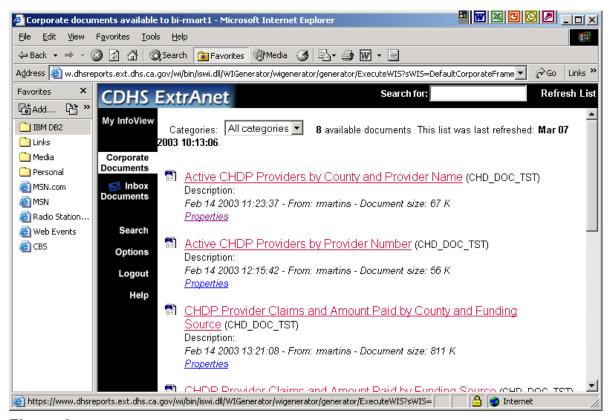


Figure 6.

- 2. If the report you select is a Prompted report then it will then ask you to input the requested prompts before it runs the report. See Figure 7.
- 3. Enter the Begin and End Dates for the query and then click Run Query. Click Cancel if you do not want to run the report and it will take you back to the Corporate Documents page.

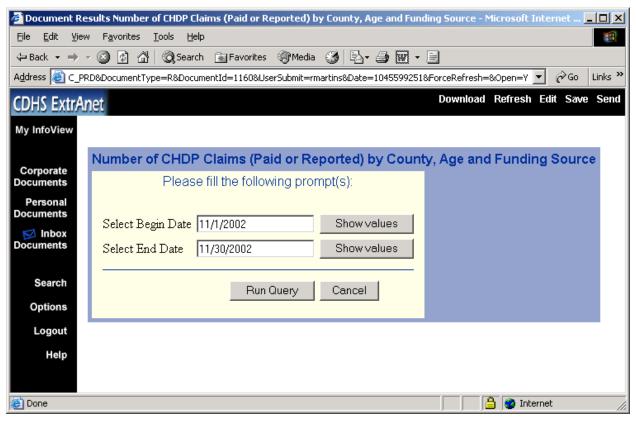


Figure 7.

- 4. If the report does not have any prompts to answer, the results will be displayed when the report has finished running. See Figure 8.
- 5. From the report screen you can page through the reports by using the arrows in the toolbar.

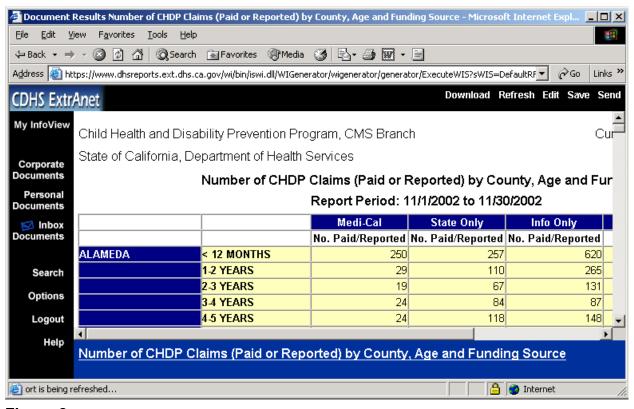


Figure 8.

#### C. Printing Reports

- To PRINT a CHDP Corporate Report, begin by Selecting/Clicking a CHDP Corporate Report for Viewing, from the CHDP Corporate Documents List. See Figure 9.
- 2. For the example found in Figure 9, select the report <u>Number of CHDP Claims (Paid or Reported)</u> by Age and Funding Source.



Figure 9.

NOTE: These printing instructions are intended for CHDP Users that are setup to View or Display the CHDP Reports in HTML (WEB Based) Format. CHDP Reports that are formatted for Legal-Sized Paper (8 ½ by 14) or Landscape Orientation may require the User to adjust the printer settings as illustrated in Figures 15 and 16.

Enhanced Document Viewing and Printing is available. This feature more readily supports the printing of Legal-Sized and Landscape-Oriented documents, and Page Ranges on larger reports. To request Enhanced Document View, CHDP Users need to be authorized to load software on their Desktop (PC). Please contact Carol Tetz, CHDP Program Support, Information Technology Section, Children's Medical Services, at (916) 327-2271, email: <a href="mailto:ctetz@dhs.ca.gov">ctetz@dhs.ca.gov</a> for more information.

- 3. Enter the **Begin** and **End** Dates to run the report. See Figure 10.
- 4. The report will be displayed after pressing Run Query.

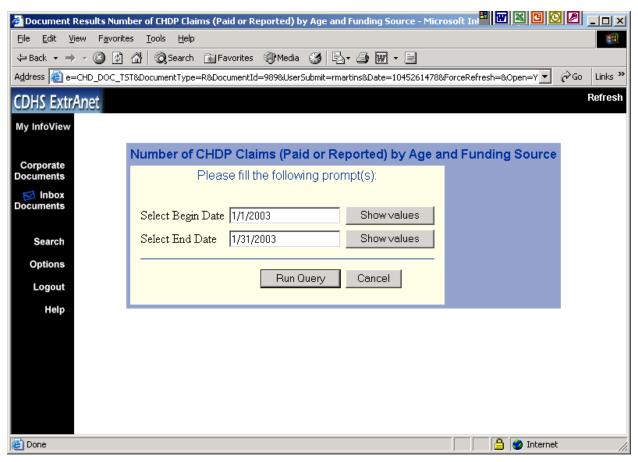


Figure 10.

5. There are four methods available to print this report:

**Method 1:** Click the Print Icon located on the Tool Bar at the Top of the Screen. This option will print the report on your default printer. See Figure 11.

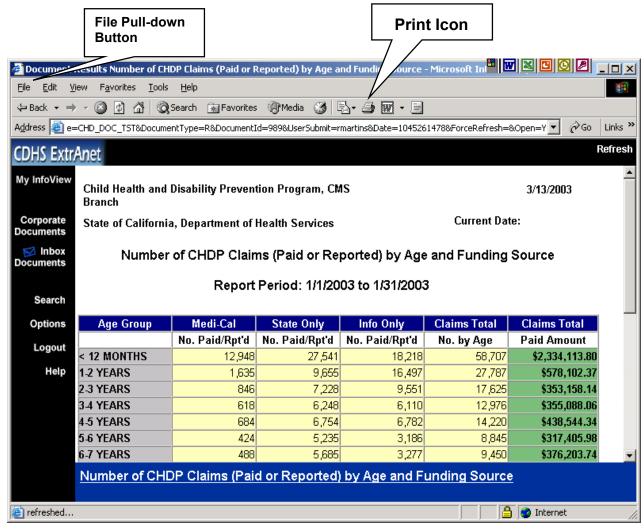


Figure 11.

**Method 2:** Click the File Pull-down Button to List Menu Options. This is illustrated in Figure 12.

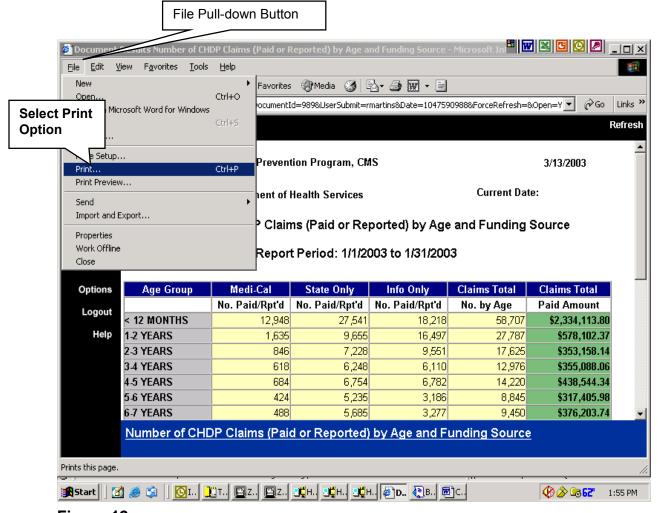


Figure 12.

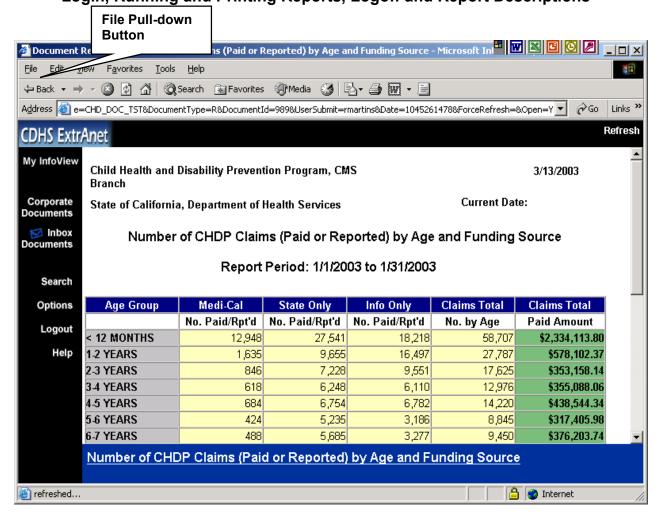


Figure 11.

**Method 2:** Click the File Pull-down Button to List Menu Options. This is illustrated in Figure 12.

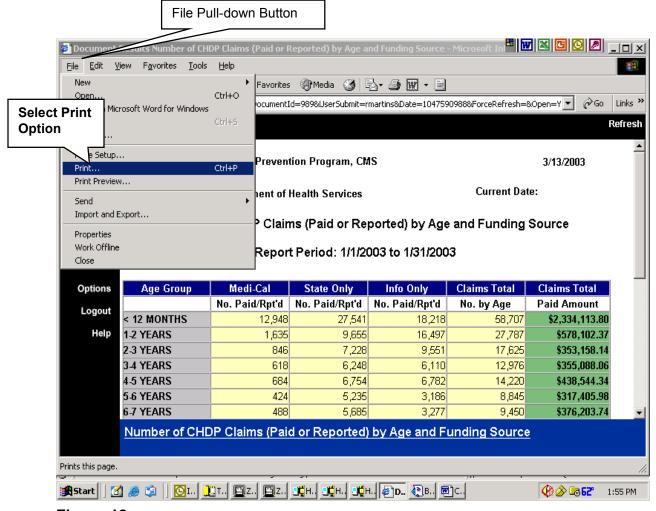


Figure 12.

- a) After pressing Print, a window with Tabs will display that will give you the opportunity to:
  - Print the Report using the current print settings by pressing the Print Button.
     See Figure 13.
  - Route the report to other printers if your PC is attached to other Printers.
     See Figure 13.

The General Tab lists the available Printers - if your PC is attached to other printers.

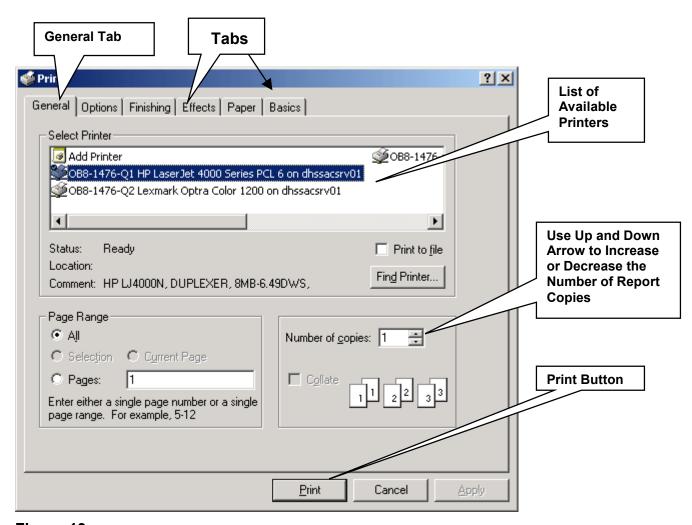


Figure 13.

- b) After pressing Print, a window with Tabs will display that will give you the opportunity to:
  - Print the report on both sides of the paper, also referred to as Duplex printing if your printer supports that function. See Figure 14.
  - Click the Box to the Left of 'Print on Both Sides'. This will enable Duplex Printing of the Report.

Select the Finishing Tab to print the report on both sides of the paper, or Duplex.

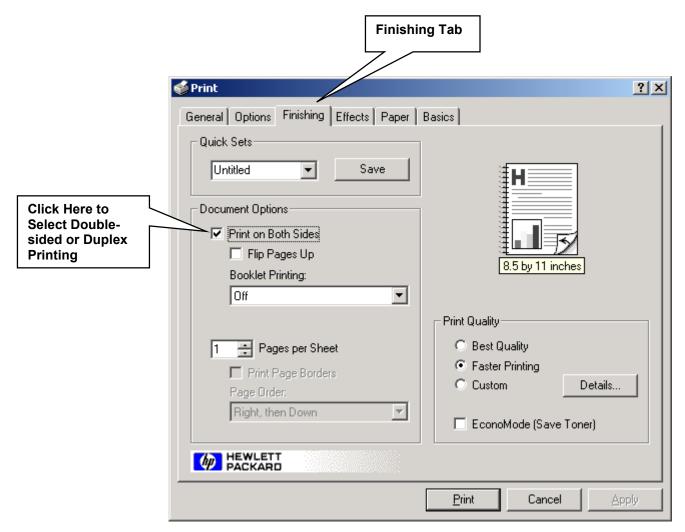


Figure 14.

- c) After pressing Print, a window with Tabs will display that will give you the opportunity to:
  - Print the report on other than standard 8 ½ by 11 paper by clicking the Down arrow to display the list of available paper sizes.

Select the <u>Paper Tab</u> to print the Report on other than standard 8 ½ by 11 paper. Select **Legal** to change paper size to 8 ½ by 14. See Figure 15.

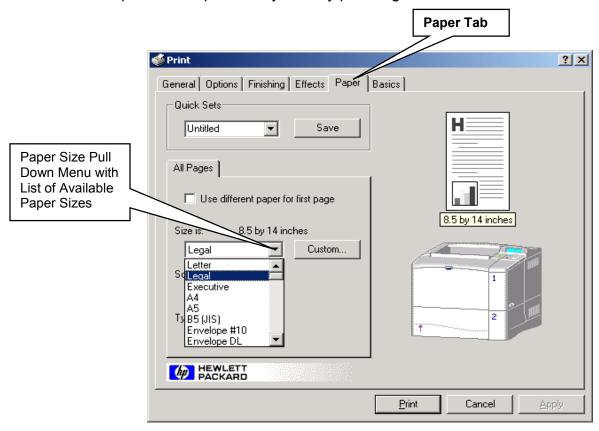


Figure 15.

- d) After pressing Print, a window with Tabs will display that will give you the opportunity to:
  - Change the orientation of the report, from Portrait to Landscape or from Landscape to Portrait. See Figure 16.

Select the <u>Basics Tab</u> to change the orientation from Portrait to Landscape and select the number of copies of the Report.

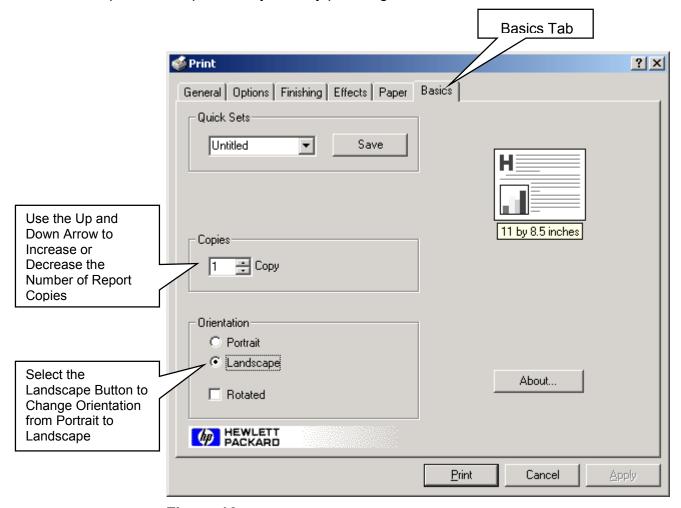
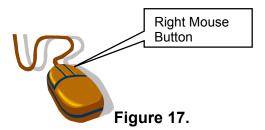


Figure 16.

**Method 3:** Position the cursor over the displayed report and Right-Click the mouse. Click the mouse button on the top right side as shown in Figure 17.



- Select Print with the left mouse button. See Figure 18.
- After selecting Print, a window with Tabs will display that will give you the opportunities demonstrated in Figures 13 through 16.

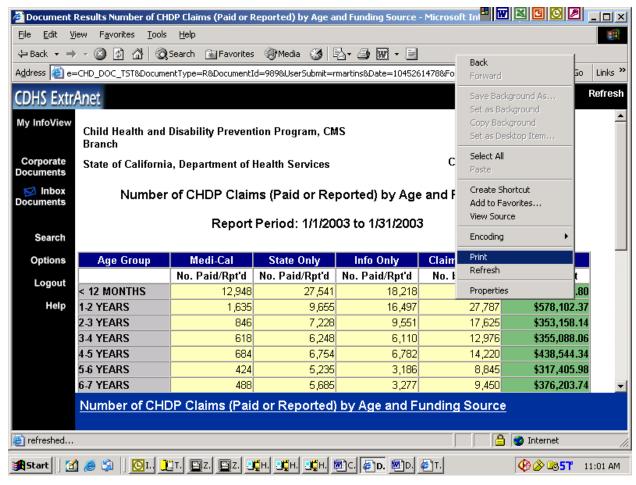


Figure 18.

**Method 4:** Copy the Report to an Excel Spreadsheet and Print.

 To Print a CHDP Corporate Report from an Excel spreadsheet, begin by selecting/clicking a CHDP Corporate Report for Viewing, from the CHDP Corporate Documents Page. See Figure 19.

For the example found in Figure 19, select the report <u>Number of CHDP</u> Claims (Paid or Reported) by Age and Funding Source.

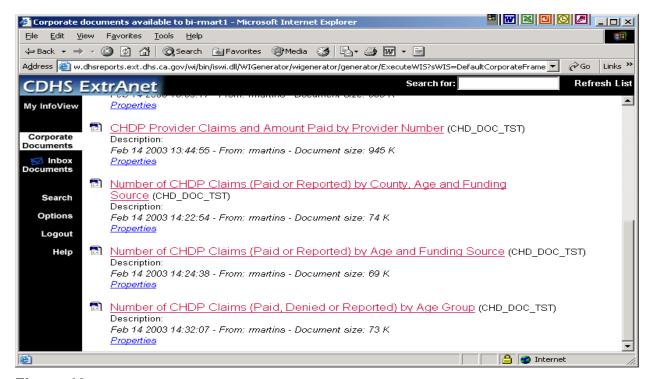


Figure 19.

- Enter the Begin and End Dates to run the report. See Figure 20.
- The report will be displayed after pressing Run Query.

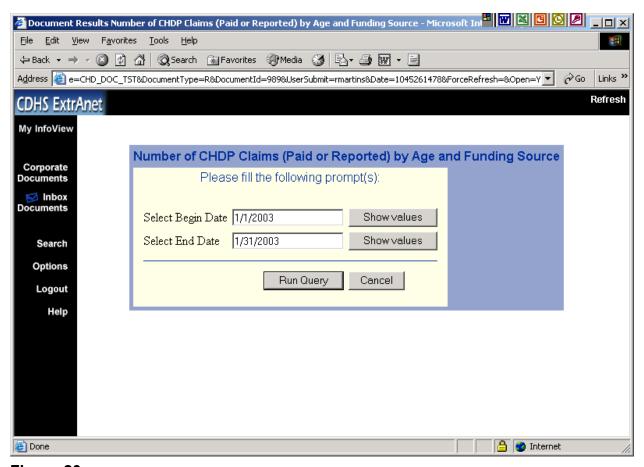


Figure 20.

- Place your cursor anywhere on the displayed report. Click the left mouse button to position the cursor.
- Click the Edit Pull-down Button to List Menu Options. This is illustrated in Figure 21.
- Click the Select All Option.

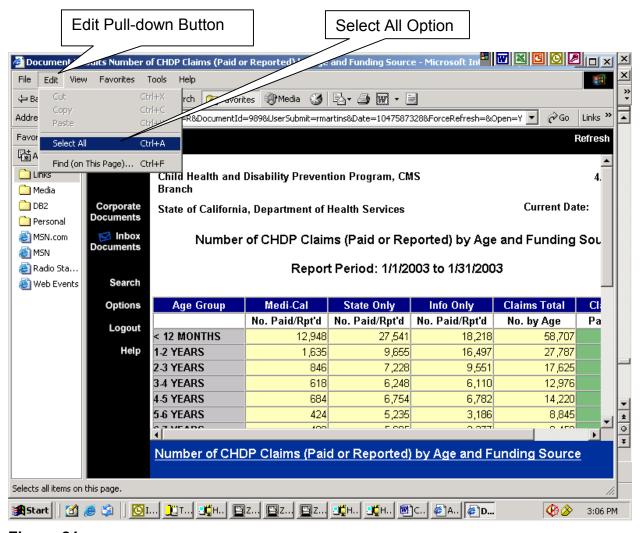


Figure 21.

The Report Fields will be highlighted. This is illustrated in Figure 22.

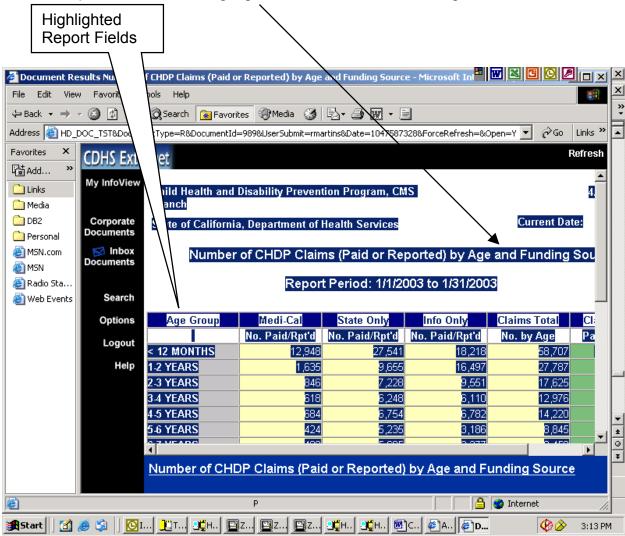


Figure 22.

- Click the Edit Pull-down Button to List Menu Options. This is illustrated in Figure 23.
- Click the Copy Option.
- Or, you can also see next page…

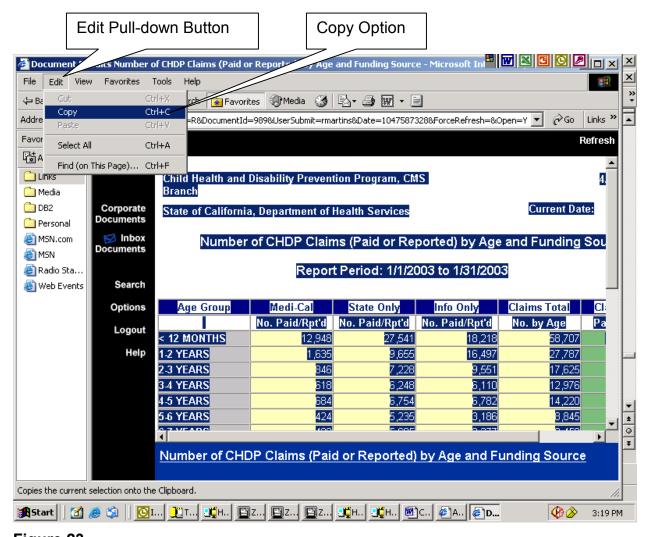


Figure 23

 Position the cursor over the displayed/highlighted report and Right-Click the mouse. Click the mouse button on the top right side as shown in Figure 24.

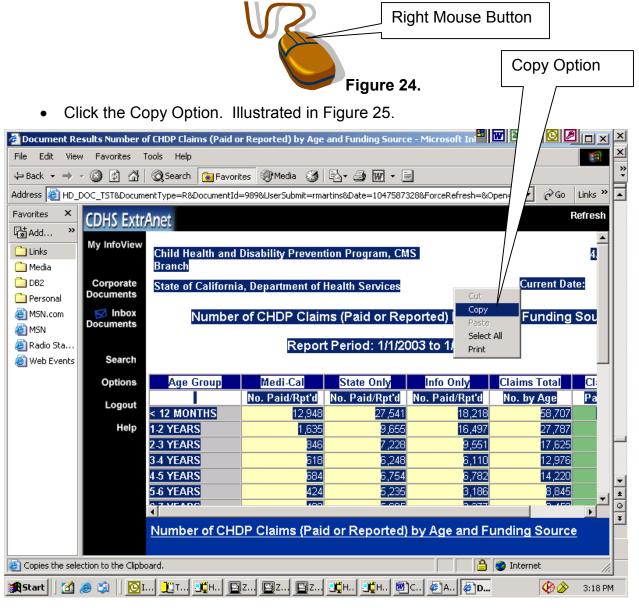


Figure 25.

 The unformatted Business Objects report will be 'pasted' into Excel. This is illustrated in Figure 28.

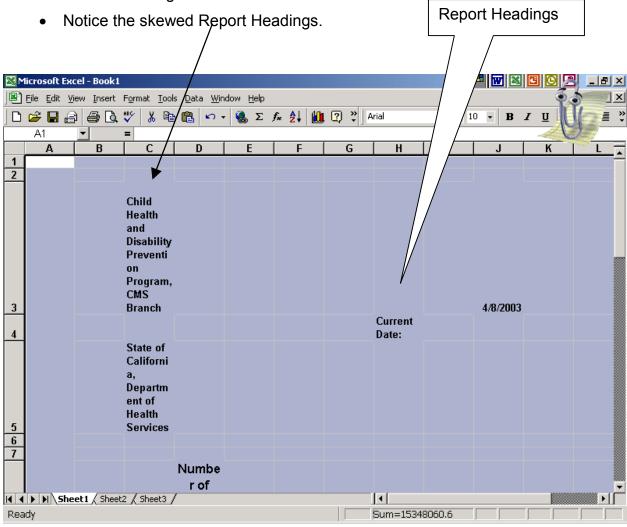


Figure 28.

- Highlight the Excel Rows to be deleted see darkened Excel Row numbers 2, 3, 4, 5, 6, and 7, in Figure 29.
- Click Edit Pull-down Button to List Menu Options.
- Select Delete to Delete Highlighted/Selected Excel rows.
- You may need to repeat the steps until all unwanted Report Heading Rows are deleted.

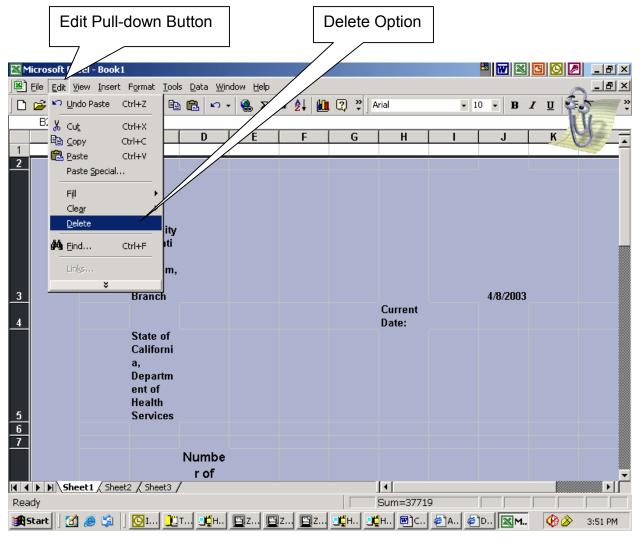


Figure 29.

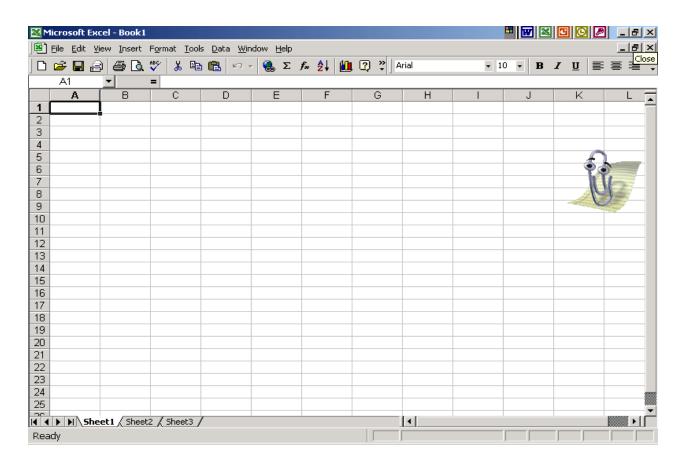


Figure 26.

- Click the Edit Pull-down Button to List Menu Options. This is illustrated in Figure 27.
- Click the Paste Option.

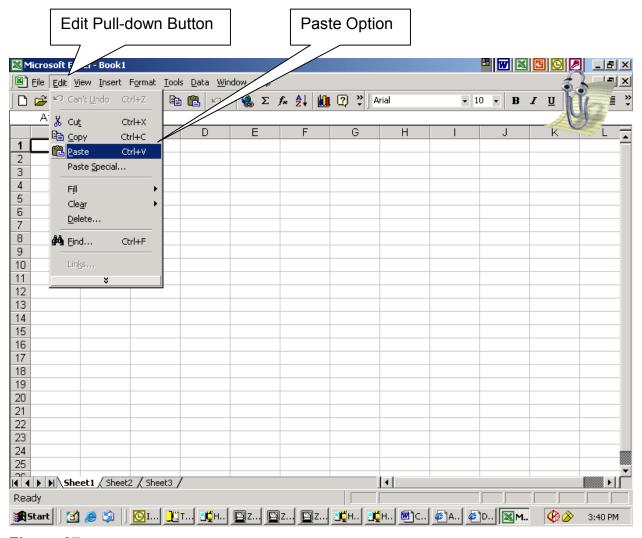


Figure 27.

 The unformatted Business Objects report will be 'pasted' into Excel. This is illustrated in Figure 28.

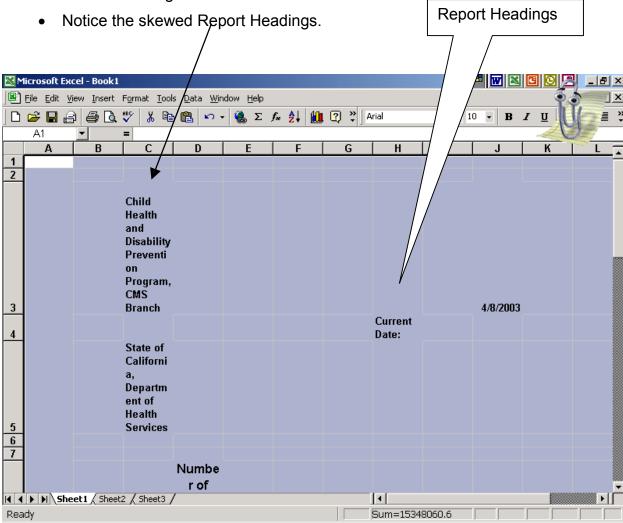


Figure 28.

- Highlight the Excel Rows to be deleted see darkened Excel Row numbers 2, 3, 4, 5, 6, and 7, in Figure 29.
- Click Edit Pull-down Button to List Menu Options.
- Select Delete to Delete Highlighted/Selected Excel rows.
- You may need to repeat the steps until all unwanted Report Heading Rows are deleted.

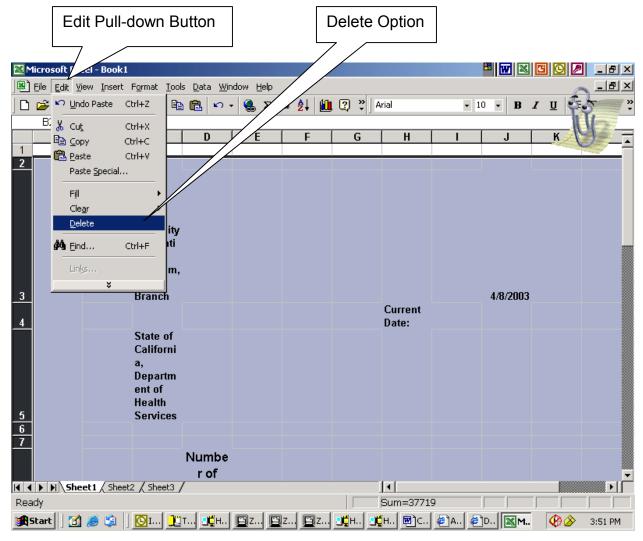


Figure 29.

- Select Excel Rows 1 through 3, in Figure 30.
- Click Edit Pull-down Button to List Menu Options.
- Select Delete to Delete Highlighted/Selected Excel rows.

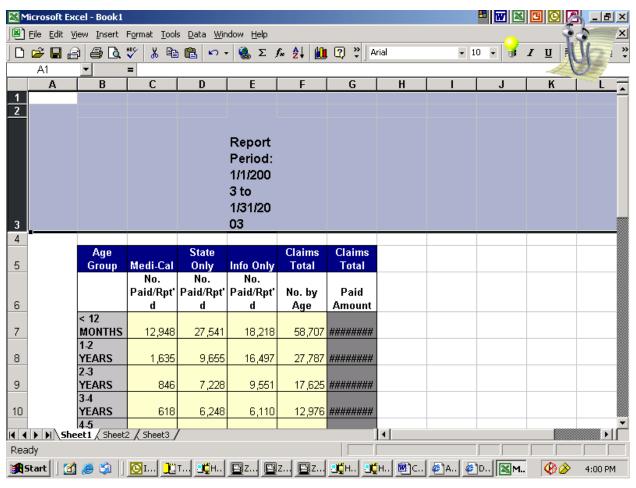


Figure 30.

- Once all Report Heading Rows are deleted the actual report with the associated Column Headings will be displayed, see Figure 31.
- Notice the ######## displayed in the Column Labeled Paid Amount. This
  column is not wide enough to display the maximum values for that column.
  You can expand the column width by clicking and dragging the column
  separator. Use that technique to size the report.

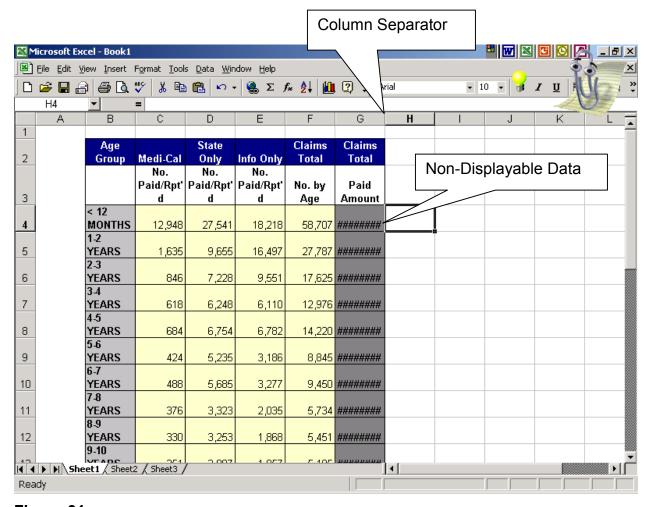


Figure 31.

- The final edited Excel version of the Number of CHDP Claims (Paid or Reported) by Age and Funding Source is shown in Figure 32.
- Select Print and the options as outlined in Methods 2 and 3.

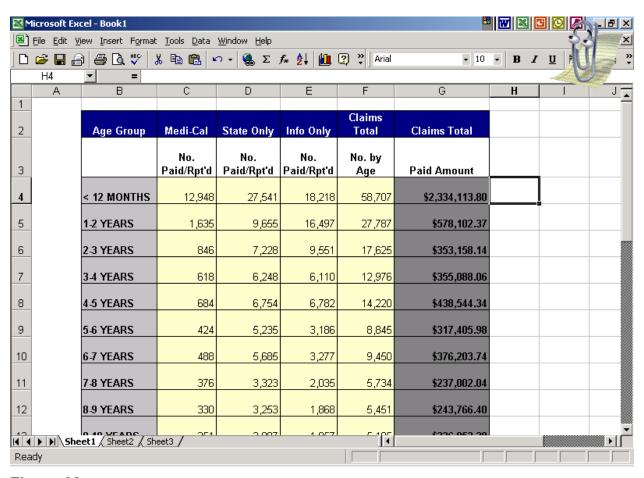


Figure 32.

#### D. Extranet/Intranet LogOut

- To Logout of the Business Objects CHDS Reporting Systems Intranet/Extranet site, click on Logout anytime from the Navigation Bar – located on the left-hand side of the display screen. After clicking on Logout you will get the Logout screen (see figure 33).
- 2. Click the 'Yes' button if you really want to Logout. Click 'No' to go back to the Corporate Documents screen. After clicking 'Yes' you will go back to the CDHS Reporting Systems Login screen.

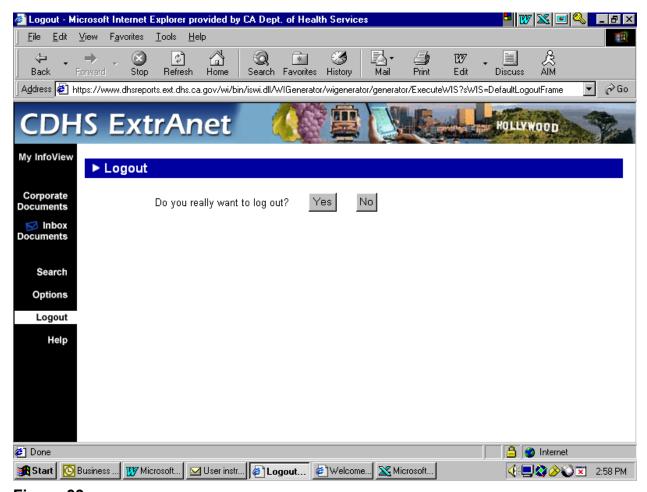


Figure 33.

#### **Report Descriptions**

❖ All reports are displayed with the most recent information when opened.

Report Name	Description	Fields	Conditions
Active CHDP Providers by Provider County/City and Provider Name	Lists Active Providers By County/City Local Program and Provider Name (Alphabetic).	County/City/ Name, Provider Name, Provider Number, Type, Category, Status, Street Address, City, Zip Code, LA District Code and Approval Date.	Providers with a Status = 'A'. Breaks on Change in County/City. Status column displays values for Primary Secondary Indicator (Primary, Secondary and Laboratory). LA District Code only Valid for Providers in Los Angeles County.
Active CHDP Providers by Provider Number	Lists Active Providers in Provider Number Sequence (Numeric).	Provider Number, Provider Name, Category, Status, Street Address, City, Zip Code, LA District Code and Approval Date.	Providers with a Status = 'A'. Status column displays values for Primary Secondary Indicator (Primary, Secondary and Laboratory). LA District Code only Valid for Providers in Los Angeles County.
CHDP Provider Claims and Amount Paid by County/City and Funding Source	Counts the Number of Paid and Denied Claims by County/City Local Program Provider Office Location, Provider and Funding Source.	County/City Name, Provider Name, Provider Number, Paid and Denied Claim Counts by Funding Source, Total Claim Count and Claim Paid Amount.	Information Displayed for Requested Report Period – Supplied via Report Prompt. Sub-totals for Counties by Provider Office Location and Statewide Totals.
CHDP Provider Claims and Amount Paid by Funding Source	Counts the Number of Paid and Denied Claims by Provider Name and Funding Source.	Provider Name, Provider Number, Paid and Denied Claim Counts by Funding Source, Total Claim Count and Claim Paid Amount.	Information Displayed for Requested Report Period – Supplied via Report Prompt. Statewide Totals at Bottom of Report.
CHDP Provider Claims and Amount Paid by Provider Number	Counts the Number of Paid and Denied Claims by Provider Number and Funding Source.	Provider Number, Provider Name, Paid and Denied Claim Counts by Funding Source, Total Claim Count and Claim	Information Displayed for Requested Report Period – Supplied via Report Prompt. Statewide Totals at Bottom of Report.

Prepared by the California Department of Health Services CHDP Program, CMS Branch

#### **Business Objects**

Report Name	Description	Fields	Conditions
·		Paid Amount.	
Number of CHDP Claims (Paid or Reported) by County/City, Age and Funding Source	Counts the Number of Paid or Reported Claims by County/City Local Program of Child's Residence, Age Group and Funding Source. Includes Claims Count Totals By Age Group and Total Amount Paid by Age Group.	County/City Name, Age Group Description, Number of Paid or Report Claim Counts by Funding Source, Total Claim Count and Claim Paid Amount by Age Group.	Information Displayed for Requested Report Period – Supplied via Report Prompt. Sub-totals for Counties and Statewide Totals.
Number of CHDP Claims (Paid or Reported) by Age and Funding Source	Counts the Number of Paid or Reported Claims by Age Group and Funding Source. Includes Claims Count Totals By Age Group and Total Amount Paid by Age Group.	Age Group Description, Number of Paid or Report Claim Counts by Funding Source, Total Claim Count and Claim Paid Amount by Age Group.	Information Displayed for Requested Report Period – Supplied via Report Prompt. Statewide Totals at Bottom of Report.
Number of CHDP Claims (Paid or Reported) by Age Group	Counts the Number of Paid or Reported Claims by Age Group and Funding Source. Includes Claims Count Totals By Funding Source and Total Amount Paid Funding Source.	Age Group Description, Number of Paid or Report Claim Counts by Funding Source, Total Claim Count and Claim Paid Amount by Funding Source.	Information Displayed for Requested Report Period – Supplied via Report Prompt. Sub-totals by Age Group and Statewide Totals at Bottom of Report.

#### Business Objects Child Health and Disability Prevention (CHDP) Reporting System CHANGE REQUEST

Submit Change Request via e-mail or fax to the Regional Nurse Consultant in your Regional CMS Office, Los Angeles, Sacramento, or San Francisco. Please consult the CMS Directory for the e-mail address and fax number.

Submitted By						Date Submitted
County or City Prograr	n	Phone Number		_	Fax Number	
E-Mail Address					( ) -	<del>_</del>
System Application:	☐ CHE	P Screen Name / # :				
		Detailed I	Descr	iption of Reque	est	
Requested By:				Approved By:		
Description of Reque	st:					
Reason for Change:						
Benefits of Change:						
Benefits of onlings.						
		CMS	S Offi	ce Use Only		
Request Approved	Re	quest Assigned To				
Request Declined	☐ Re	ason Request Declined:		constrained by Resources contrary to CHDP Policy suplicate Request cateway Related included with Implemental leed Additional Information dequires Further Analysis lot Technically Feasible other:	tion of another Fon / Clarification	
			_			